

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

1 14

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 11/06/2012		2. CONTRACT NO. (if any) EP-W-11-010		6. SHIP TO:	
3. ORDER NO. 0024		4. REQUISITION/REFERENCE NO. PR-OA-12-00164		a. NAME OF CONSIGNEE Cheryl R. Brown	
5. ISSUING OFFICE (Address correspondence to) HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460				b. STREET ADDRESS 1200 Pennsylvania Avenue, N. W. Mail Code: 1804A Phone: 202-566-0940 Email: Brown.cherylr@Epa.gov	
				c. CITY Washington	e. ZIP CODE 20460

7. TO: NA		f. SHIP VIA	
a. NAME OF CONTRACTOR SYSTEMS RESEARCH AND APPLICATIONS CORPORATION		8. TYPE OF ORDER	
b. COMPANY NAME		<input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY	
c. STREET ADDRESS 4300 FAIR LAKES COURT		REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
d. CITY Fairfax	e. STATE VA	f. ZIP CODE 22033	

9. ACCOUNTING AND APPROPRIATION DATA See Schedule		10. REQUISITIONING OFFICE	
11. BUSINESS CLASSIFICATION (Check appropriate box(es))			12. F.O.B. POINT
<input type="checkbox"/> a. SMALL <input checked="" type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input type="checkbox"/> d. WOMEN-OWNED <input type="checkbox"/> e. HUBZone <input type="checkbox"/> f. SERVICE-DISABLED VETERAN-OWNED <input type="checkbox"/> g. WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOSB PROGRAM <input type="checkbox"/> h. EDWOSB			

13. PLACE OF		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
a. INSPECTION Destination	b. ACCEPTANCE Destination			

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	DUNS Number: (b)(4) TO 0024: Smart Growth Economic Benefits TOPO: Ted Cochran Max Expire Date: 11/30/2013 Continued ...					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOTAL (Cont. pages)
21. MAIL INVOICE TO:						
a. NAME RTP Finance Center						\$0.00
b. STREET ADDRESS (or P.O. Box) US Environmental Protection Agency RTP-Finance Center Mail Drop D143-02 109 TW Alexander Drive						
c. CITY Durham				d. STATE NC	e. ZIP CODE 27711	\$223,851.00

22. UNITED STATES OF AMERICA BY (Signature)		23. NAME (Typed) Jody Gosnell TITLE: CONTRACTING/ORDERING OFFICER	
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**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO

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IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 11/06/2012 CONTRACT NO. EP-W-11-010

ORDER NO.
0024

ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0001	<p>Admin Office: HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460 Period of Performance: 11/06/2012 to 11/30/2013</p> <p>Technical Assistance for Smart Growth Econmic Benefits in accordance with the attached Statement of Work and the vendor's technical quote dated 08/31/2012 and revised cost proposal dated 11/01/2012</p> <p>Estimated Cost: \$(b)(4) Fixed Fee: \$(b)(4) Cost Plus Fixed Fee \$223,851</p> <p>Accounting Info: 12-13-B-11W-301MA4-2505-1211W21091-001 BFY: 12 EFY: 13 Fund: B Budget Org: 11W Program (PRC): 301MA4 Budget (BOC): 2505 DCN - Line ID: 1211W21091-001 Funding Flag: Partial Funded: \$33,701.85 Accounting Info: 12-13-BR-11W0X72-301MA4-2505-1211W2109 1-002 BFY: 12 EFY: 13 Fund: BR Budget Org: 11W0X72 Program (PRC): 301MA4 Budget (BOC): 2505 DCN - Line ID: 1211W21091-002 Funding Flag: Partial Funded: \$190,149.15</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))

\$0.00

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OPTIONAL FORM 348 (Rev. 4/2006)
Prescribed by GSA FAR (48 CFR) 53.213(f)

Statement of Work
Contract Number: EP-W-11-009/EP-W-11-010/EP-W-11-011
RFO number: 24

I. TITLE: Smart Growth Economic Benefits

II. PERIOD OF PERFORMANCE:

Phase 1: Date of Award to January 26, 2013

Phase 2: January 27, 2013 – May 31, 2013

III. QUALITY ASSURANCE (QA) REQUIREMENTS

Check [] Yes if the following is required or [X] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

IV. BACKGROUND:

On June 16, 2009, the U.S. Department of Housing and Urban Development (HUD), U.S. Department of Transportation (DOT), and the U.S. Environmental Protection Agency (EPA) joined together to create the Partnership for Sustainable Communities ("The Partnership"). This historic collaboration works to help communities nationwide improve access to affordable housing, promote business vitality, increase transportation options, and lower transportation costs while protecting the environment. The Partnership was created to better coordinate federal transportation, environmental protection, and housing investments and to identify strategies that advance the six following Livability Principles:

- *Provide more transportation choices.* Develop safe, reliable, and economical transportation choices to decrease household transportation costs, reduce our nation's dependence on foreign oil, improve air quality, reduce greenhouse gas emissions, and promote public health.
- *Promote equitable, affordable housing.* Expand location- and energy-efficient housing choices for people of all ages, incomes, races, and ethnicities to increase mobility and lower the combined cost of housing and transportation.
- *Enhance economic competitiveness.* Improve economic competitiveness through reliable and timely access to employment centers, educational opportunities, services and other basic needs by workers, as well as expanded business access to markets.

- *Support existing communities.* Target federal funding toward existing communities—through strategies like transit oriented, mixed-use development, and land recycling—to increase community revitalization and the efficiency of public works investments and safeguard rural landscapes.
- *Coordinate and leverage federal policies and investment.* Align federal policies and funding to remove barriers to collaboration, leverage funding, and increase the accountability and effectiveness of all levels of government to plan for future growth, including making smart energy choices such as locally generated renewable energy
- *Value communities and neighborhoods.* Enhance the unique characteristics of all communities by investing in healthy, safe, and walkable neighborhoods—rural, urban, or suburban.

A major goal of the Partnership is to foster improvements in the economic and financial situation of individuals, communities, and businesses. While many of the smart growth and sustainable community strategies promoted through the partnership have been shown anecdotally to be of value in attaining these goals, empirical evidence around this point needs further development. Additionally, detailed research will help identify the best set of indicators for evaluating economic outcomes across a range of community types.

The following list provides some examples of the type of outcomes that the Partnership hopes to help communities across the country achieve:

- A diversified and competitive local and regional economy
- Sustained economic activity that is resilient with regard to changing market conditions
- Increased levels of affordable housing, particularly in high opportunity areas
- Expanded opportunities for commerce
- Access to capital and technical assistance for locally-based enterprises
- Quality of life indicators that attract new investment
- Reduced barriers to reinvestment in existing neighborhoods
- Efficient movement of goods and services
- A demographic mix that encourages creativity and innovation
- Preservation and enhancement of the existing retail and commercial base
- Reliable and timely access to employment centers
- Access to education, jobs, housing and training across income groups

Partnership agencies are coordinating their efforts with states and regions to evaluate and measure the economic impacts of policies and investments that utilize livability

principles, and adopt sustainable community strategies. There has been some evidence suggesting that important productivity gains accrue to economies that foster diverse, well connected labor markets, vibrant centers, efficient transportation systems, and a high “quality-of-place”—all objectives of the smart growth and sustainable community approaches. In theory, these approaches should facilitate firms’ access to suppliers, contractors, specialized labor, and capital. In turn, this access catalyzes the sort of “agglomeration” efficiencies or “knowledge spillovers” that result from the sharing of information, ideas, technology and opportunities. However, limited research has been done to connect different growth patterns and investment decisions to a community or region’s economic output, business development, retention of major employers, and ability to attract highly productive workers.

Some work has been done to survey the area of economic indicators. For example, the University of Pennsylvania’s Existing Indicators Research Project published a report titled “Sustainable Urban Development Indicators for the United States.”¹ The Project’s findings include “that coverage of social wellbeing and economic indicators is insufficient, and the number of indicator systems in the review must be expanded.”

In a similar fashion, the Center for Clean Air Policy (*Growing Wealthier*, 2011) surveyed the literature on the economic impacts of implementing the 10 principles of smart growth.² While a useful collection of some evidence, the report also highlights the significant gaps that limit a more comprehensive evaluation of policies and programs. In some cases, the evidence (e.g. specific savings for households and business, increased productivity, more diverse and resilient local economies, vitality measured in stable growth in household and business income, etc.) is either anecdotal or not well connected to specific smart growth and sustainable community design policies. Finally, a longer standing tradition exists in the urban economics field that ties regional development patterns to economic growth and resiliency. For example, ECONorthwest and the APA created the Local Government Economic Development Toolbox³ and Harvard economist Ed Glaeser and others have examined the ability of dense urban cities to capitalize on economies of localization and agglomeration under the assumption that in

¹ Birch, Eugenie, et. al., *Sustainable Urban Development Indicators for the United States*, University of Pennsylvania, 2011

² C. Kooshian and S. Winkelman, *Growing Wealthier: Smart Growth, Climate Change and Prosperity*. <http://www.growingwealthier.info/>

³ Local Government Economic Development Toolbox

Prepared for Envision Utah by ECONorthwest, Eugene, OR the American Planning Association, Chicago, IL and

http://www.envisionutah.org/Economic%20Development%20Toolbox_PartII_III_ProfToolbox.pdf

the “knowledge economy” clusters of talented people, or “human capital,” are a key driver of productivity and economic growth.⁴

However, much more work is needed to deepen the evidence base around the economic benefits of more sustainable communities and regions. Systematically quantifying the economic benefits of sustainable development policies and programs is challenging. First, benefits may be realized at a neighborhood, community or regional scale. Differences in the distribution of costs and benefits among groups and over time further complicate the story. At various scales, common outcomes include: attracting new businesses, growing existing businesses, and overall growth of the local economy. Sustainable community strategies support characteristics including the following:

- *Centrality* – the agglomeration of firms in proximity to one another within an accessible centre
- *Connectivity* – the promotion of internal networking to facilitate knowledge transfer
- *Live/Work/Play Neighborhoods* – the opportunity to live and work within flexible, high amenity, mixed use environments
- *High Quality Connections to External Networks* – the ability of firms to operate within a global economic environment
- *Learning and Playing* – the encouragement of social interaction and creativity
- *Branding* – the creation of identifiable places with symbolic value

These themes of connectivity and flexibility highlight the importance of interaction and networking facilitated by a creative and dynamic environment. It underpins the development of comprehensive and integrated activity centers.⁵

This work is meant to be the next step in gaining a clearer understanding of the role that sustainable planning and investment approaches can play in attracting new businesses, attracting workers, supporting existing businesses and jumpstarting state and local economies.

V. PURPOSE AND OBJECTIVE:

The purpose of this task order is to further develop the evidence base that allows communities and regions to understand the potential economic benefits of smart growth and sustainable community design strategies. While many individual case studies have highlighted economic and fiscal efficiencies related to smart growth,⁶ a stronger empirical evidence base will allow a more informed assessment of programs across a wide variety of communities. The results of this analysis will help improve assessment and modeling of smart growth strategies in promoting economic vitality and better inform

⁴ Glaeser, Edward, *Triumph of the City*, <http://www.triumphofthecity.com/> and Glaeser, Edward L. "Cities, Productivity, and Quality of Life." *Science* 333.6042 (July 2011): 592-594.

⁵ *Creative Placemaking*. 2010. <http://arts.gov/pub/pubDesign.php>

⁶ <http://www.epa.gov/smartgrowth/publications.htm#bizdev>

the PSC and decision makers from jurisdictions across America on how to tailor and apply those approaches to their own unique circumstances.

VI. TASKS AND DELIVERABLES:

The Task Order COR (TO COR) will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the TO COR's comments. Contractor shall provide the TO COR electronic copies of all deliverables.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1: Post Award Meeting (II.A.1 - Qualitative Research, Quantitative Analysis, Modeling and Database Management)

Within two weeks of receiving the award, as directed by the TO COR, the Contractor shall meet with the TO COR and representatives from HUD and DOT to discuss the Contractor's proposed research methodology including the range of indicators to be measured, sustainable communities' policies and programs to be evaluated, and communities to be analyzed. Given that the Partnership is supporting work in a diverse range of communities and seeks to undertake a comprehensive analysis of the range of economic impacts that different types of smart growth strategies have upon communities, the Contractor shall consider a number of different factors in selecting the indicators, programs and policies and communities for the analysis to be conducted in Task 3. The Task Order COR will issue technical direction to confirm information decided at the meeting.

To provide additional information on the types of factors that the Partnership feels are important to this analysis, the following indicators and policies are to be considered by the Contractor in developing its research methodology and work plan.

Indicators include but are not limited to:

- 1) Fiscal/Business Indicators
 - a) Business starts/closures/expansion analysis
 - b) Changes in property tax base value per acre (not unit)
 - c) Sales tax revenues
 - d) New or relocated businesses - business permits
 - e) New jobs and total number of jobs in region, by industry and income
 - f) Growth of jobs in central business districts of principle cities of the metropolitan statistical area
 - g) Growth of jobs near major transit facilities
 - h) Total office space vs. available and vacancy rate

- 2) Housing Industry Indicators
 - a) Rate of home sales
 - b) Number of new housing starts
 - c) Percent of new starts in urban core
- 3) Economic Diversity and Resiliency Indicators
 - a) Industry mix/diversity
 - b) Business size diversity
 - c) Diversity of business ownership by race and gender
 - d) Income and wage disparities
 - e) Information Technology knowledge cluster
 - f) Smaller decline in retail sales
 - g) Maintaining income /wage levels in entertainment and recreation sectors in the face of rising fuel costs
 - h) Other industry clusters with high percentage of "creative class" workers.
- 4) Labor Related Indicators
 - a) Trends, changes by industry type and business size over time
 - b) Change in number of workers with a bachelors degree
 - c) Changes in wage rates and annual salary levels
 - d) Worker retention and recruitment
 - e) Unemployment rates
 - f) Combined housing and transportation costs, average vehicle miles travelled (VMT) and commuter mode split for region

Further, the Partnership believes a common set of plans and policies are typically at the heart of successful sustainable community strategies at the community, regional or state scale. For example:

- 1) Region- or local-wide plans to concentrate economic development around established activity centers and regional transit;
- 2) Local neighborhood design guidelines focused on creating walkable, mixed-use business districts;
- 3) Plans and policies designed to revitalize economically distressed communities or neighborhoods;
- 4) Plans and policies designed to reduce income disparities within a state or region;
- 5) Policy options designed to promote a better regional jobs/housing balance;
- 6) Integrated state or regional infrastructure and land use plans and policies
- 7) Value capture strategies to support targeted reinvestment, downtown revitalization, creation of enterprise zones;
- 8) Regulatory and financial incentives to reduce VMT, and to promote transit supportive and pedestrian friendly development; and

- 9) Increased public investment in public transportation and pedestrian infrastructure.

The Partnership is interested in evaluating the actual performance of communities who have implemented sustainable communities strategies consistent with the Livability Principles to evaluate the selected economic indicators to determine whether, and to what degree, such policies have on economic output, business development and industry diversity, and job creation and retention.

At the post award meeting the contractor shall discuss the range and number of communities that will be evaluated through this research. EPA, HUD and DOT will identify a short list of communities it considers leaders in adopting sustainable development practices. The Contractor shall recommend a list of 40 communities (cities, counties or regions) for consideration as the locations for further study and analysis in Task 3. The Contractor shall include a recommendation as to the final number of communities to be analyzed, but at a minimum the analysis must include 25 communities from across the country with similar regional scale, proximity to large central cities and demographic characteristics, but differing adoption of the policies and programs listed above.

Factors to be used in determining communities include but are not limited to:

- Population size of the metropolitan statistical area, including representation from micropolitan, medium size and large cities;
- Geographic distribution to represent different portions of the country;
- Mix of economic growth including shrinking economies, fast growth and emerging economies;
- Presence and size of existing fixed guideway transit systems;
- Presence and size of pedestrian and bicycle infrastructure;
- Recipient of Partnership sustainable communities grants;
- Enacted complete streets policies or programs;
- Tax-increment, business improvement districts or other financing structures that connect community redevelopment, affordable housing, or place-making investments with increased economic activity;
- Preservation or creation of open space, green space, and/or natural resource conservation areas;
- Percentage investment in maintaining existing infrastructure systems versus building new capacity; and,
- Land use policies enacted that support affordable housing, mixed-income or mixed-use development and other compact development policies.

Within 5 business days of the meeting the Contractor shall provide to the TO COR a written summary of the notes of the meeting including a set of recommended indicators, policies and programs to evaluate, and identified communities as subjects for analysis in this Task Order. The Contractor shall also provide its final research work plan for approval. The TO COR will provide this information to HUD and DOT for input that will be reflected in the technical direction issued by the TO COR to the Contractor specifying,

at a minimum, which indicators, policies and/or programs, and communities shall be incorporated into the methodology developed by the Contractor in Task 2.

Task 2: Evaluate Components of Analysis. (II.A.1 - Qualitative Research, Quantitative Analysis, Modeling and Database Management)

Based on the indicators provided above, the contractor shall propose a methodology for this task and submit it with their task order proposal. As a part of their proposal, the Contractor shall propose a set of recommendations on:

- The set of indicators to be used; and
- The policies and programs to be evaluated.

The Contractor shall evaluate and categorize economic performance metrics and indicators that can be applied to a set of recommended sustainable community and smart growth policies. These metrics will include those economic indicators similar to those mentioned in Task 1. The methodology shall also identify what challenges might exist in developing metrics and/or cataloging policies and programs to be used in the analysis.

Task 3: Analysis (II.A.1 - Qualitative Research, Quantitative Analysis, Modeling and Database Management)

The Contractor shall assess the extent to which communities identified have implemented sustainable development policies and programs over the past 10 years and shall also provide an explanation of why these communities were chosen along with any explanation of why any other considered communities were not chosen.

Within 21 days of receipt of the TO COR's technical direction, the Contractor shall deliver to the TO COR a presentation that summarizes the final set of indicators, policies and programs, and communities that comprise the final research methodology for the Task 3 analysis. The Contractor shall conduct a comparative analysis of the economic indicators of smart growth policies and programs in up to 40 communities. The contractor shall propose a number of communities consistent with the level of effort per community associated with the proposed methodology. The set of communities will be selected in Task 2 by the TO COR in consultation with the contractor. They will be grouped according to their geographic areas, population sizes, growth patterns and a range of slow to strong economic regions. The Contractor's proposal shall include what methodology and/or models the Contractor proposes to use in this task as well as what experience the Contractor has had in conducting similar analyses.

If in the process of the analysis the Contractor finds that any of the outcome indicators, policies and programs, or communities is determined to be not suitable for the analysis, the Contractor shall notify the TO COR with a brief analysis of the problem and await technical direction on how to continue.

The TO COR will share this information with HUD for its joint review and approval. The presentation shall be accompanied by a briefing memo that describes the methodology used by the Contractor to assess the value and usefulness of indicators, policies and programs, and communities, as well as a list selected elements of each category they recommend for use in the Task 3 analysis. The TO COR will share this information with the Partnership for review. The TO COR will coordinate the federal review of the assessment presentation and briefing memo and provide comments to the Contractor. The Contractor shall revise the assessment presentation and briefing memo, and present a final version to EPA within 14 calendar days of receiving the Federal comments.

The Contractor shall present their preliminary findings of the analysis to a group of federal reviewers including the TO COR. In addition to the presentation, the Contractor shall prepare a brief (maximum 15 page) written summary that will be available at the time of the presentation.

The preliminary findings shall include discussion of any indicators, policies and programs, or communities that dropped from the analysis.

While a significant part of this analysis will be based upon a quantitative evaluation of the relationship between the various sustainable development policies and programs, the Contractor shall also provide some theories that would explain the connections between sustainable community policies and programs and the respective economic outcomes. Themes that the Contractor must explore, but is not limited to, include:

- The role of regional planning and smart growth strategies in promoting or inhibiting (a) an entrepreneurial culture that facilitates the growth of new firms, expansion of existing firms, and/or strengthening of industry clusters; and, (b) adoption of new technologies that stabilize struggling central cities, reduce fiscal disparities, and promote cooperative use of resources;
- The influence of smart growth, spatial economics, location theory, and network/clustering forces in promoting or inhibiting technological spillovers (technological externalities), agglomeration and economies of scale, localization economies, and urbanization economies;
- The effect smart growth programs have on disparities within a region, access to opportunity for disadvantaged households, and the jobs housing balance, pockets of persistent unemployment;
- The influence of smart growth and sustainable communities strategies upon small business development and retention over time both at the regional level and within specific corridors where transportation and pedestrian infrastructure investments occur;
- The degree to which consistent and transparent land use policies, neighborhood design guidelines, economic development strategies, and permitting schemes will facilitate or inhibit business development in appropriate locations;

- The effect of proximity among firms on communication, supplies, laborers and innovative ideas transfer;
- Methodologies for assessing the pull factor to see if the area is attracting firms, customers, and workers from outside its region or losing them to another region, and whether job growth in the region is providing employment for existing residents or drawing in new residents;
- How higher income disparities within a region contribute to or prevent regional economic downturn and their impact on economic recovery after the downturn; and
- Why some regions are adversely affected when an economic shock occurs (i.e., experience an economic downturn as we define it), while others are not (i.e., are shock-resistant) and why some businesses may be more sensitive to market conditions and policy decisions, examining the effect of business size and entrenchment in the regional economy.

The TO COR will provide this information to HUD and DOT to solicit their comments on the preliminary findings. The TO COR will provide these federal comments to the Contractor for use in Task 4.

Task 4: Final report synthesis of Results: (II.A.1 - Qualitative Research, Quantitative Analysis, Modeling and Database Management)

The Contractor shall prepare a draft final report that combines findings of the quantitative analysis conducted in Task 3, any Contractor theories as to causation in the findings, as well as the federal review comments shared by the TO COR on deliverables in Task 3. The report shall also include any analysis and evaluation of indicators, policies and programs and communities conducted in Tasks 1 and 2. The report shall conclude with any limitations of the analysis and recommendations for further study. The Contractor shall deliver the draft final report within 15 business days of receipt of the TO COR's comments in Task 3. The TO COR will share these deliverables with HUD and EPA and coordinate federal review of draft final report. The TO COR will provide comments to the Contractor that must be addressed in the final report. Within 15 business days of receipt of the TO COR's comments on the draft final report, the Contractor shall incorporate the TO COR's comments and deliver the final report to EPA.

Task 5: Develop Outreach Materials (II.A.1 - Qualitative Research, Quantitative Analysis, Modeling and Database Management)

The Contractor shall prepare present up to 5 presentations on the process and result of the analysis conducted in this Task Order. Up to two (2) presentations shall be presented to an audience of primarily federal officials and up to three (3) presentations to a nonfederal audience. Four (4) of the five (5) presentations may be delivered in a Webinar format to reduce travel costs and scheduling challenges. The Contractor will not be responsible for the costs of hosting any on-line presentations, but will be required to manage registrations and ensure that any archived audio or visual materials comply with federal requirements.

Within 7 calendar days of delivering the final report in Task 4, the Contractor shall prepare 2 draft presentations in PowerPoint format — one for a federal audience and one for a general audience. The presentation shall include graphics, tables, and key findings from the report. The TO COR will share these PowerPoints with the Partnership for review. The TO COR will coordinate EPA, DOT, and HUD review of the PowerPoint presentations and provide comments to the Contractor. Within 7 calendar days of receipt of the TO COR's comments on the draft presentations, the Contractor shall deliver the final presentations to EPA.

SCHEDULE FOR DELIVERABLES:

The Contractor shall provide the following specific deliverables to the EPA TO COR:

	DELIVERABLE	FORM AND QUANTITY	SCHEDULE
Task 1:	Summary Notes of Meeting and Recommended Indicators, Policies and Programs, and Communities for Analysis	As defined in Task 1	Within 5 business days of Post Award Meeting defined in Task 1.
Task 2:	Draft Approach methodology presentation and briefing memo. Final Approach Methodology presentation and briefing memo	As defined in Task 2 As defined in Task 2	Within 21 calendar days of receipt of federal technical direction. Within 14 calendar days of receipt of TO COR's comments.
Task 3:	Presentation of findings to Federal reviewers	As defined in Task 3	Within 21 calendar days of completion of Task 2.
Task 4:	Draft Final Report Final Report	As defined in Task 4	Within 15 business days of receipt of TO COR comments on presentation of findings. Within 15 business days of receipt of TO COR's comments on Draft Final Report.

Task 5	Draft Presentation materials	As Defined in Task 5	Within 7 calendar days of completion of Task 4
	Final Presentation materials		Within 7 calendar days of receipt of TO COR's comments

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE		PAGE OF PAGES 1 2	
2. AMENDMENT/MODIFICATION NO. 001		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY HPOD US Environmental Protection Agency Headquarters Procurement Operations Ariel Rios Building 1200 Pennsylvania Avenue, NW Washington DC 20460		7. ADMINISTERED BY (If other than Item 6) CODE		5. PROJECT NO. (If applicable)	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) SYSTEMS RESEARCH AND APPLICATIONS CORPORATION Attn: NA 4300 FAIR LAKES COURT Fairfax VA 22033		(x) 9A. AMENDMENT OF SOLICITATION NO.		9B. DATED (SEE ITEM 11)	
CODE (b)(4)		FACILITY CODE		10A. MODIFICATION OF CONTRACT/ORDER NO. EP-W-11-010 0024	
				10B. DATED (SEE ITEM 13) 11/06/2012	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)
X	Extend the period of performance under the authority of FAR 43-103(a)(3) bilateral modifications

E. IMPORTANT: Contractor ☒ is not. ☐ is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: (b)(4)

TO 0024: Smart Growth Economic Benefits

TOPO: Ted Cochin Max Expire Date: 12/31/2013

The purpose of this modification is to extend the Task Order period of performance from November 30, 2013 to December 31, 2013 at no additional cost to the government.

LIST OF CHANGES:

Period Of Performance End Date changed from 2013-11-30 00:00:00 to 2013-12-31 00:00:00

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kathryn Barton	
15B. CONTRACTOR/OFFEROR (b)(4) (Signature of person authorized to sign)	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA (Signature of Contracting Officer)	16C. DATE SIGNED

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NAME OF OFFEROR OR CONTRACTOR
SYSTEMS RESEARCH AND APPLICATIONS CORPORATION

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>Maximum Potential Expiration Date changed to : 12/31/2013</p> <p>Payment:</p> <p>RTP Finance Center US Environmental Protection Agency RTP-Finance Center Mail Drop D143-02 109 TW Alexander Drive Durham NC 27711</p> <p>Period of Performance: 11/06/2012 to 12/31/2013</p>				

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE		PAGE OF PAGES 1 3									
2. AMENDMENT/MODIFICATION NO. 002		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO. See Schedule									
5. PROJECT NO. (If applicable)		6. ISSUED BY HPOD		7. ADMINISTERED BY (If other than Item 6) CODE									
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) SYSTEMS RESEARCH AND APPLICATIONS CORPORATION Attn: (b)(4) 4300 FAIR LAKES COURT Fairfax VA 22033		(x) 9A. AMENDMENT OF SOLICITATION NO.		9B. DATED (SEE ITEM 11)									
CODE (b)(4)		FACILITY CODE		10A. MODIFICATION OF CONTRACT/ORDER NO. EP-W-11-010 0024									
				10B. DATED (SEE ITEM 13) 11/06/2012									
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS													
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.													
12. ACCOUNTING AND APPROPRIATION DATA (If required) See Schedule		Net Increase:		\$315.52									
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;">CHECK ONE</td> <td>A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.</td> </tr> <tr> <td></td> <td>B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).</td> </tr> <tr> <td style="text-align: center;">X</td> <td>C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 -- Changes -- Cost-Reimbursement (Aug 1987) Alternate I (Apr 1984)</td> </tr> <tr> <td></td> <td>D. OTHER (Specify type of modification and authority)</td> </tr> </table>						CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.		B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).	X	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 -- Changes -- Cost-Reimbursement (Aug 1987) Alternate I (Apr 1984)		D. OTHER (Specify type of modification and authority)
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.												
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).												
X	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 -- Changes -- Cost-Reimbursement (Aug 1987) Alternate I (Apr 1984)												
	D. OTHER (Specify type of modification and authority)												
E. IMPORTANT: Contractor <input checked="" type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ 0 _____ copies to the issuing office.													
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) DUNS Number: (b)(4) TO 0024: Smart Growth Economic Benefits TOPO: Ted Cochin Max Expire Date: 12/31/2013 The purpose of this modification is to:													
1. Increase the task order cost ceiling by \$(b)(4) (see cost/ fee breakdown below) to account for costs associated with the government shutdown as requested in the contractors approved request for equitable adjustment dated 11 November 2013 and subsequent invoice #16 dated 25 February 2014 for \$(b)(4); and													
2. Add funding in the amount of \$(b)(4) to cover these additional costs. Continued ...													
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.													
15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Stefan Martiyan											
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)		15C. DATE SIGNED		16C. DATE SIGNED 06/23/2014 ELECTRONIC SIGNATURE									
NSN 7540-01-152-8070 Previous edition unusable		STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243											

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NAME OF OFFEROR OR CONTRACTOR
SYSTEMS RESEARCH AND APPLICATIONS CORPORATION

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>Cost Ceiling: (b)(4) Fee Ceiling: \$ Total CPFF: \$224,166.52</p> <p>In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's "proposal(s) for adjustment" dated 11 November 2014, the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable to such facts or circumstances giving rise to the "proposal(s) for adjustment."</p> <p>LIST OF CHANGES:</p> <p>Total Amount for this Modification: \$(b)(4) New Total Amount for this Version: \$224,166.52 New Total Amount for this Award: \$224,166.52 Obligated Amount for this Modification: \$(b)(4) New Total Obligated Amount for this Award: \$224,166.52 Incremental Funded Amount changed: from \$(b)(4) to \$224,166.52</p> <p>CHANGES FOR LINE ITEM NUMBER: 1 Description changed to:</p> <p>Technical Assistance for Smart Growth Econmic Benefits in accordance with the attached Statement of Work and the vendor's technical quote dated 08/31/2012 and revised cost proposal dated 11/01/2012.</p> <p>Estimated Cost: \$(b)(4)** Fixed Fee: \$(b)(4)** Cost Plus Fixed Fee \$224,166.52**</p> <p>** Per TO modification 2, this breakdown includes a cost increase of \$(b)(4) due to a request for equitable adjustment dated 11 November 2014.</p> <p>Total Amount changed from \$(b)(4) to \$224,166.52 Obligated Amount for this modification: \$(b)(4) Incremental Funded Amount changed from \$(b)(4) to \$224,166.52</p> <p>CHANGES FOR DELIVERY LOCATION: HPOD Amount changed from \$(b)(4) to \$224,166.52 Continued ...</p>				

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NAME OF OFFEROR OR CONTRACTOR
SYSTEMS RESEARCH AND APPLICATIONS CORPORATION

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>NEW ACCOUNTING CODE ADDED: Account code: 14-15-B-11W-301MA4-2505-1411W31113-001 Amount: \$(b)(4) Payment: RTP Finance Center US Environmental Protection Agency RTP-Finance Center (D143-02) 109 TW Alexander Drive Durham NC 27711 Period of Performance: 11/06/2012 to 12/31/2013 Delivery Location Code: HPOD HPOD US Environmental Protection Agency Ariel Rios Building 1200 Pennsylvania Avenue, N. W. Mail Code: 3803R Washington DC 20460 USA</p>				